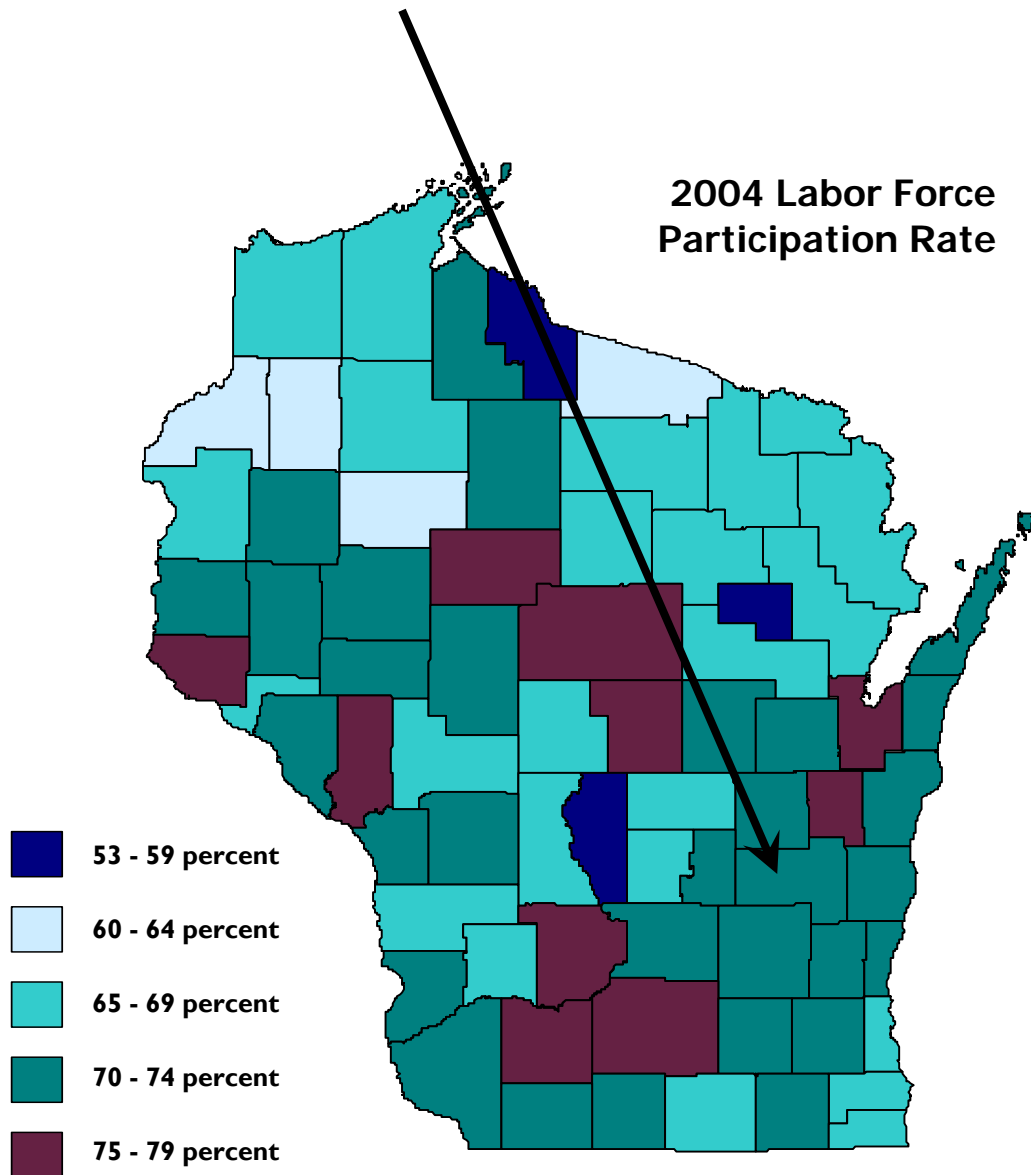


Fond du Lac County Workforce Profile



Source: Estimates created by DWD, OEA using data supplied by
U.S. Bureau of Labor Statistics and U.S. Bureau of Census

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State of Wisconsin
Department of Workforce Development
Office of Economic Advisors

December 2005

OEA-10615-P

County Population and Labor Force

Population growth in Fond du Lac County grew at a slower pace than the State of Wisconsin and the United States during the first five years of this decade. Between 2000 and 2005 the county added 2,884 residents to its population base. A slower-than-average growth rate for the county is projected throughout the 2000 to 2020 time period. During that time, the population in the county is expected to increase by 11.5 percent, compared to 13.9 percent for the state and 19.3 percent for the nation.

The percent of the population aged 16 and over that is currently in the labor force is 73.3 percent. This is higher than the statewide average of 70.8 percent. This average fluctuates on a monthly and annual basis depending on where we are in the economic cycle during the year as well as how the overall economy is doing. Generally, the participation rate in Wisconsin and Fond du Lac County are well above the national average, which is currently 65.4 percent. Wisconsin's labor force participation rate is usually in the top five nationally. A disadvantage of a high participation rate is restrictions on future job growth for the region. How do you create more jobs, if there is not a pool of available workers.

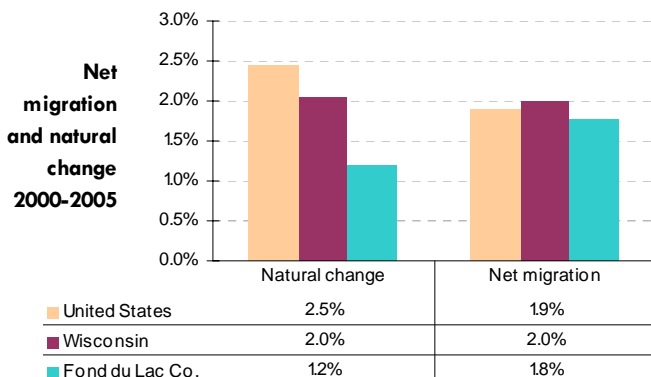
The make-up of the county's population by age group is different than the state and nation. The percentage of the youngest group (those 16 to 24 years old) is above the state and nation, as is the group over 60 years, while those between 25 and 59 make up a smaller portion of the area's population.

Five largest municipalities in Fond du Lac County

	April 2000 Census	Jan. 1, 2005 estimate	Numeric change	Percent change
Fond du Lac County	97,296	100,180	2,884	3.0%
Fond du Lac, City	42,203	43,101	898	2.1%
Ripon, City	7,450	7,559	109	1.5%
North Fond du Lac, Villa	4,557	4,781	224	4.9%
Taycheedah, Town	3,666	3,886	220	6.0%
Waupun, City*	3,282	3,324	42	1.3%

*Fond du Lac County portion only

Source: Wis. Dept. of Administration, Demographic Services, August 2005



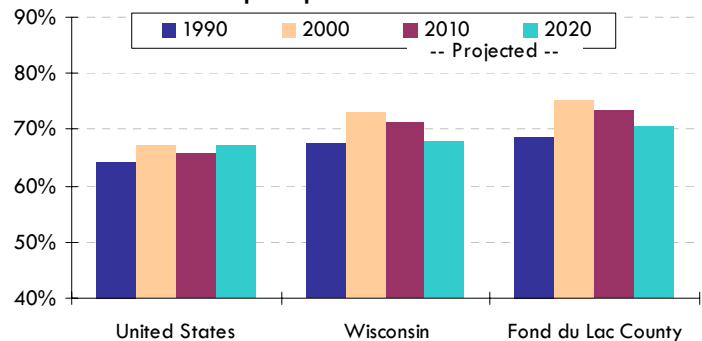
Source: WI Dept. of Admin., Demographic Services & US Census Bureau

Population and Labor Force

	United States	Wisconsin	Fond du Lac County
Total population in 2000	281,424,602	5,363,715	97,296
Population est. Jan. 1, 2005	295,160,302	5,580,757	100,180
Change	13,735,700	217,042	2,884
% change	4.9%	4.0%	3.0%
2005 Labor force population*	224,837,000	4,339,938	78,340
Share of total population	76.2%	78%	78.2%
Labor force	147,125,000	3,071,179	57,401
Labor force participation rate	65.4%	70.8%	73.3%
2005 Population 16 yrs. & over	228,621,674	4,417,313	80,330
16-24 yrs old	37,489,370	743,764	13,946
Share of population 16+ yrs	16.4%	16.8%	17.4%
25-59 yrs old	142,248,896	2,708,865	47,641
Share of population 16+ yrs	62.2%	61.3%	59.3%
60 yrs and older	48,883,408	964,684	18,743
Share of population 16+ yrs	21.4%	21.8%	23.3%
Projected population: 2020	335,804,546	6,110,878	108,494
Population 16 yrs. & over	264,085,104	4,869,573	87,120
16-24 yrs old	37,918,865	681,586	10,806
Share of population 16+ yrs	14.4%	14.0%	12.4%
25-59 yrs old	150,678,402	2,756,884	49,685
Share of population 16+ yrs	57.1%	56.6%	57.0%
60 yrs and older	75,487,837	1,431,103	26,629
Share of population 16+ yrs	28.6%	29.4%	30.6%

* civilian population 16 yrs. and older not in an institution

Percent of labor force age population that participates in labor force



Source: special tabulation by OEA using US Census, US Bureau of Labor Statistics, WI Dept. of Admin. estimates and projections

This will have an impact on economic development as the area currently has a greater share of young workers entering the labor force to replace retirees than the state and nation. However, this will change by 2020 when the area will have a smaller percentage of young workers and a greater percentage of population over 60 than the state and nation.

Revised Labor Force

The county's labor force had its largest increase of workers between 1990 and 1991 when it increased by just over 3,400 workers and again in 1993 to 1994 when it increased by 3,000. This was the period during and right after the recession of 1991. The county's unemployment rate began to decline starting in 1992 and ending in 1999, reaching 2.8 percent. This was just prior to the most recent recessionary period which occurred during the early part of 2001. Unlike many areas, the size of the county's labor force has increased since 2000. Currently the labor force for the county is at 57,401. Since 2000, Fond du Lac County has been designated as a Metropolitan Statistical Area (MSA) by the U.S. Census Bureau.

While the recession ended nationally in 2001, the unemployment rate in the county did not peak until 2003 when it reached 5.3 percent. Since that time, the number of unemployed as well as the rate has dropped considerably. Although the rate has moderated during the last year, the number of workers estimated to be unemployed remain above the long term average over the period.

Fond du Lac County Civilian Labor Force Estimates

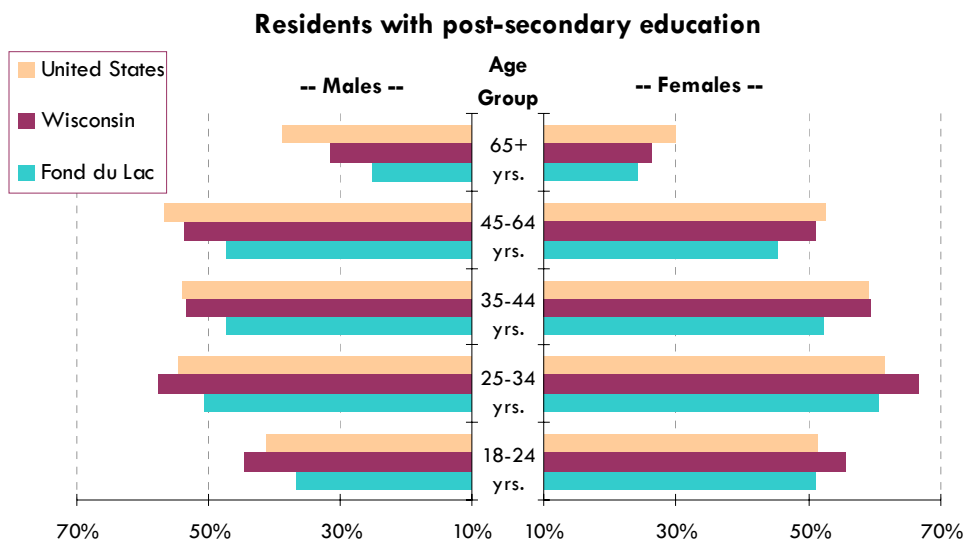
	Labor force	Employed	Unemployed	Unemployed rate
1990	48,845	46,350	2,495	5.1%
1991	52,301	49,773	2,528	4.8%
1992	52,320	49,998	2,322	4.4%
1993	52,135	50,155	1,980	3.8%
1994	55,142	53,112	2,030	3.7%
1995	55,422	53,558	1,864	3.4%
1996	55,386	53,513	1,873	3.4%
1997	55,527	53,682	1,845	3.3%
1998	55,108	53,453	1,655	3.0%
1999	54,592	53,077	1,515	2.8%
2000	55,890	54,224	1,666	3.0%
2001	56,635	54,343	2,292	4.0%
2002	57,253	54,452	2,801	4.9%
2003	57,311	54,268	3,043	5.3%
2004	57,401	54,766	2,635	4.6%

Source: DWD, Bureau of Workforce Information, Local Area Unemployment Statistics, September 2005

Education Attainment

The focus of this county's analysis, to this point has been on quantitative changes in Fond du Lac County's population and labor force. At this point we will shift our focus to information on the quality of the county's labor force in comparison with the state and nation by age and gender.

Among the ways that experts use to measure the overall quality of a region's skilled workforce is through an analysis of the level of education attainment among the population. An example of this type of analysis is depicted in the graph below. In reviewing this data, a number of significant trends are apparent.



The county is surpassed by the state and national averages at all of the five age levels for both male and females as to the level of post-secondary education (measured as attendance at either a technical or community college and/or four-year college or university). The percentage of females with post secondary education in the county exceed males in the 18 to 24 year old, 25 to 34, and 35 to 44 year old categories, while the percentage of males in 45 to 64 and 65 plus groups slightly exceeds the percentage of females with post-secondary education. This is similar to state and national trends.

Source: US Census 2000, Summary file 3, QT-P20

Employment and Wages

Average wages in Fond du Lac County were nearly nine percent below the statewide average in 2004. Two industry groups in the county had average wages that were higher than the state averages, construction and manufacturing.

The highest paid industry in the county is manufacturing at \$44,732. This is 101.3 percent of the state's average. Construction is the next highest wage industry which is at 102.4 percent of the statewide average.

Manufacturing has the greatest number of workers of any industry group with over 23 percent of the county's jobs. These jobs represent nearly a third of all wages paid in the county for a total of nearly \$475 million. While employment and wages for this industry are the highest in the county, the industry sector also had the greatest loss of jobs between 2003 and 2004, with a loss of 1,741 jobs.

Professional and business services had the second highest number of workers, while the education and health services industry provided the second greatest portion of the county's total wages of any industry. This is not to diminish the importance of the other industries in the county. It is important that an area have a wide diversity of industry to provide the balance it needs as well as to provide buffers to the ups and

Average Annual Wage by Industry Division in 2004

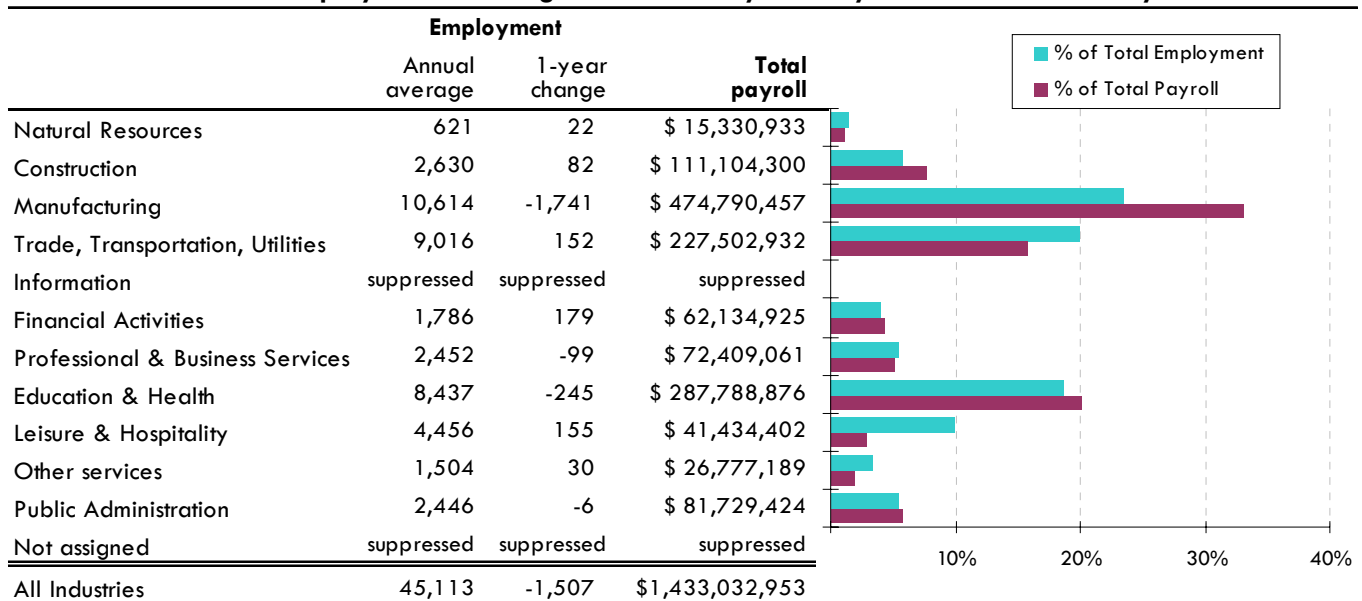
	2004	2004		
	Average Annual Wage		Percent of	1-year
	Wisconsin	Fond du Lac County	Wisconsin	% change
All Industries	\$ 34,749	\$ 31,765	91.4%	2.6%
Natural resources	\$ 27,399	\$ 24,687	90.1%	8.9%
Construction	\$ 41,258	\$ 42,245	102.4%	4.1%
Manufacturing	\$ 44,145	\$ 44,732	101.3%	3.5%
Trade, Transportation, Utilities	\$ 30,088	\$ 25,233	83.9%	4.9%
Information	\$ 41,759	suppressed	Not avail	Not avail.
Financial activities	\$ 45,103	\$ 34,790	77.1%	-5.4%
Professional & Business Services	\$ 39,580	\$ 29,531	74.6%	5.6%
Education & Health	\$ 36,408	\$ 34,110	93.7%	7.1%
Leisure & Hospitality	\$ 12,295	\$ 9,299	75.6%	1.4%
Other services	\$ 20,207	\$ 17,804	88.1%	5.7%
Public Administration	\$ 36,347	\$ 33,414	91.9%	3.0%

Source: WI DWD, Bureau of Workforce Information, Quarterly Census of Employment & Wages

downs in the national economy during the annual economic cycles each industry experiences.

The financial activities industry has added the most jobs over the last year with 179 jobs. This is followed by job creation in the leisure and hospitality industry with the addition of 155 jobs, however, average wages in the leisure and hospitality industry are generally at the lower end of the scale than other industries in Fond du Lac County as well as Wisconsin due to the seasonality of the businesses. Many of the jobs are part time and only part of the year.

2004 employment and wage distribution by industry in Fond du Lac County



Source: WI DWD, Bureau of Workforce Information, Quarterly Census Employment and Wages, June 2005

Industry and Employers by Size

Top 10 Employers in Fond du Lac County

Establishment	Product or Service	Size (Dec. 2004)
Brunswick Corp	Other engine equip. mfg.	1000+ employees
Agnesian Healthcare Inc	Pharmacies & drug stores	1000+ employees
Fond du Lac School District	Elementary & secondary schools	1000+ employees
County of Fond du Lac	Executive & legislative offices, combined	1000+ employees
Alliance Laundry Systems LLC	Commercial laundry & drycleaning machinery	500-999 employees
Moraine Park Technical College	Junior colleges	500-999 employees
J F Ahern Co	Nonresidential plumbing & HVAC contractors	500-999 employees
Charter Comm Holding Company LLC	Cable & other program distribution	250-499 employees
Wal-Mart Associates Inc	Discount department stores	250-499 employees
Ripon Foods Inc	Cookie & cracker mfg.	250-499 employees

Source: DWD, Bureau of Workforce Information, ES-202, July 2005

Prominent industries in Fond du Lac County

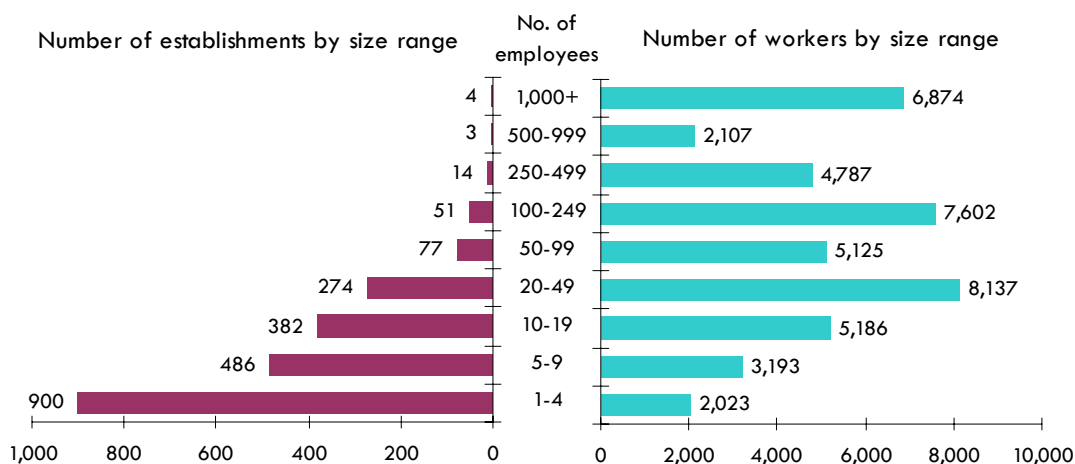
NAICS title	March 2005		Numeric change in employees	
	Establishments	Employees	2004-2005	2000-2005
Machinery manufacturing	23	5,047	153	-31
Educational services	23	3,797	-71	161
Food services and drinking places	171	3,649	-2	290
Food manufacturing	19	1,926	2	58
Executive, legislative, & gen government	34	1,771	1	-12
Hospitals	*	*	not avail.	not avail.
Specialty trade contractors	173	1,599	84	175
Ambulatory health care services	98	1,471	37	216
Nursing and residential care facilities	24	1,328	24	195
Administrative and support services	68	1,294	129	218

* data suppressed to maintain employer confidentiality

Column headings revised 02/06

Source: DWD, Bureau of Workforce Information, ES-202, September 2005

Fond du Lac County establishments and workers by employment size range in 2004



(1) Data not available due to suppression factors

Source: DWD, Bureau of Workforce Information, Table 221, July 2005

As mentioned on the previous page, Fond du Lac County has a great deal of diversity in its industry mix. This is reflected in the county's ten largest employers. There is little duplication of industries in the top ten employers. It should be noted that most of the ten largest employers are also part of the ten largest industries in the county.

It is not unusual that government services, such as county government or school districts are in the ten largest employers group. These employers are limited in number and provide services to large sectors of the population and therefore tend to have a concentrated number of workers. This coincides with the second largest industry group, educational services, which includes both the public and private educational facilities.

The graph on the bottom of this page indicates that the majority of the county's employers are small, less than 20 employees. This group makes up over 80 percent of the county's employers and 23 percent of the jobs. At the same time, the largest number of workers are employed by employers with 100 or more workers. This group makes up just 3.3 percent of the employers and 47.5 percent of the county's jobs.

Per Capita Personal Income

One other aspect of looking at the economy of a county is the per capita personal income (PCPI) in the county. Because the income is derived from all sources, it tells more than just what the wages or types of jobs are available. The latest PCPI available is for the year 2003. PCPI in Fond du Lac County was \$29,959. The county's PCPI ranks 17th highest of the state's 72 counties in amount and 38th in its five year growth rate since 1998. PCPI in the county was \$734 below the state, and \$1,521 below the nation.

PCPI is defined as total personal income divided by the total population. The majority of total personal income, though not exclusive to this list, is made up of wage and salary earnings, dividends from holdings, accrued interest, rental property income, retirement benefits, social security and other government transfer payments.

The ranking of the county's PCPI is influenced by having an average wage that was below the statewide average and a smaller percent of the population over age 60 that would receive transfer payments. The loss of jobs in the high paying manufacturing industries most likely affected the lower growth rate of PCPI over the last five years. Although total per capita income is influenced as well by sources other than wages.

Wages make up just under 69.7 percent of the county's total income. This is about the same as the state average of 69.9 percent. Remaining income in the county comes from dividends, interest and rental property income and transfer payments.

The county has a slightly above average share of its population at retirement age but it also has a higher percent of the its population in the labor force than the state. The

combination of lower wages and fewer retirees may have influenced the county having a lower PCPI than the state.

Counties with a high percentage of older residents generally will have a higher percent of the PCPI come from dividends, rental payments, and transfer payments and conversely with a younger populations income is from wages.

Wisconsin Counties 2003 Per Capita Personal Income and Rank in State

Area	2003	Rank	5-yr growth	Rank	Area	2003	Rank	5-yr growth	Rank
United States	\$ 31,472		17.1%		Manitowoc	\$ 27,807	27	13.6%	59
Wisconsin	\$ 30,685		17.2%		Marathon	\$ 29,992	16	22.0%	5
Adams	\$ 22,804	59	16.1%	37	Marinette	\$ 25,448	39	21.3%	9
Ashland	\$ 23,204	55	16.6%	32	Marquette	\$ 22,590	64	26.5%	1
Barron	\$ 24,922	41	15.2%	44	Menominee	\$ 18,449	72	19.8%	16
Bayfield	\$ 22,660	62	13.4%	60	Milwaukee	\$ 31,419	7	19.5%	18
Brown	\$ 32,076	5	17.8%	25	Monroe	\$ 23,467	54	16.8%	31
Buffalo	\$ 29,083	20	17.2%	28	Oconto	\$ 24,842	42	12.3%	66
Burnett	\$ 22,796	60	17.1%	29	Oneida	\$ 28,646	22	18.7%	21
Calumet	\$ 31,880	6	21.4%	8	Outagamie	\$ 30,952	11	20.5%	14
Chippewa	\$ 25,999	36	12.3%	67	Ozaukee	\$ 47,527	1	14.7%	48
Clark	\$ 22,227	66	13.9%	55	Pepin	\$ 24,407	44	13.0%	64
Columbia	\$ 30,846	12	18.2%	24	Pierce	\$ 27,963	26	18.6%	23
Crawford	\$ 22,628	63	20.9%	13	Polk	\$ 24,201	46	13.9%	54
Dane	\$ 36,455	3	21.0%	12	Portage	\$ 27,464	30	21.1%	11
Dodge	\$ 26,048	35	13.3%	61	Price	\$ 24,361	45	12.2%	68
Door	\$ 30,657	13	15.9%	40	Racine	\$ 31,271	8	15.0%	45
Douglas	\$ 23,568	53	15.3%	43	Richland	\$ 23,829	51	21.9%	6
Dunn	\$ 22,885	58	14.9%	47	Rock	\$ 28,256	25	14.1%	50
Eau Claire	\$ 27,469	29	17.5%	27	Rusk	\$ 20,461	71	14.0%	52
Florence	\$ 24,146	47	25.3%	3	Sauk	\$ 28,780	21	19.5%	19
Fond du Lac	\$ 29,951	17	16.1%	38	Sawyer	\$ 23,921	50	22.3%	4
Forest	\$ 21,975	68	25.4%	2	Shawano	\$ 23,941	49	13.9%	56
Grant	\$ 24,116	48	15.6%	42	Sheboygan	\$ 31,251	9	19.8%	17
Green	\$ 28,542	23	14.0%	51	St. Croix	\$ 31,091	10	13.6%	57
Green Lake	\$ 26,962	32	8.1%	72	Taylor	\$ 23,020	56	16.6%	34
Iowa	\$ 27,308	31	19.2%	20	Trempealeau	\$ 25,242	40	18.7%	22
Iron	\$ 22,912	57	21.1%	10	Vernon	\$ 20,950	70	15.7%	41
Jackson	\$ 26,084	34	21.9%	7	Vilas	\$ 25,664	37	13.0%	63
Jefferson	\$ 29,330	18	16.5%	35	Walworth	\$ 27,626	28	13.6%	58
Juneau	\$ 22,382	65	12.7%	65	Washburn	\$ 22,794	61	16.0%	39
Kenosha	\$ 29,117	19	16.5%	36	Washington	\$ 35,196	4	14.9%	46
Kewaunee	\$ 25,536	38	8.8%	71	Waukesha	\$ 41,551	2	12.2%	69
La Crosse	\$ 28,284	24	16.8%	30	Waupaca	\$ 26,863	33	14.0%	53
Lafayette	\$ 21,983	67	10.1%	70	Wausara	\$ 21,762	69	13.2%	62
Langlade	\$ 23,739	52	20.4%	15	Winnebago	\$ 30,359	15	16.6%	33
Lincoln	\$ 24,725	43	14.6%	49	Wood	\$ 30,401	14	17.7%	26

Source: U.S. Dept. of Commerce, Bureau of Economic Analysis, Regional Economic Information System, May 2005